MASTER THESIS

RIBERA DEL DUERO AND RUEDA: HOW TO GROW WITHIN WINE TOURISM MARKET

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ABSTRACT

The aim of this Master Thesis is to apply general laws about brands' growth to two DO and compare a very well-known wine region, Ribera del Duero, to a smaller and less popular one, Rueda, within the same autonomous community, Castile and León in Spain. Wine tourists behaviour, attitudes and motives will be analysed, as well as a general view on the wine tourism situation for two DO in order to propose suggestions to improve wine tourism in both of them.
Wine tourism is growing around the world and Spain is not behind. It is important not only for the wineries, but also for all the players involved, increasing regional value in rural areas and cities around. One of the most important wine regions in this country is Castile and León, with twelve DOP, nine DO and one IGP. Thus, an explanation about wine tourism situation in Spain and Castile and León will be described, followed by an analysis of Ribera del Duero and Rueda situation related to the theme. The distribution of wine tourists, their behaviour and their motives will be used to understand the position of these DO within wine tourism market and to facilitate proposals based on real data.

KEY WORDS: Brand, Light buyers, Heavy buyers, Consumer behaviour, Wine tourism, Wine tourist, Denomination of Origin (DO), Growth

LIST OF ABBREVIATIONS:
DO: Denomination of Origin
NBD: Negative Binomial Distribution
OEMV: Observatorio Español del Mercado del Vino (Spanish Observatory of Wine Market)
OIV: International Organisation of Vine and Wine
FEV: Federación Española del Vino (Spanish Federation of Wine)
DOCa: Qualified Denomination of Origin
ACEVIN: Asociación Española de Ciudades del Vino (Spanish Association of Wine Cities)
RVE: Rutas del Vino de España (Wine Routes of Spain)
DOP: Protected Denomination of Origin
RENFE: Red Nacional de Ferrocarriles Españoles (National Network of Spanish Railways)

1. INTRODUCTION

1.1. Description of the company

Wine Intelligence is a family-owned and managed business founded by Lulie and Richard Halstead in 2001. The head office is located in London but it also has regional offices located in Australia, Brazil, Germany, Spain, France, Italy, Portugal, South Africa and the US.

It is a global company dedicated to supporting wine business and associations through market research, branding and consultancy, and all its services are based on solid research data and global wine trade experience. It conducts syndicated and custom projects in more than 30 markets and also hosts workshops and presents at conferences around the world.

The aim of the company is to support organisations to make better informed strategy and investment decisions. It works in different areas such as business / export strategy, brand development, mergers and acquisitions, routes to market, opportunity analysis and market entry.

Wine Intelligence specialises in both qualitative and quantitative research methods to build evidence and insight. It provides different services such as trade expert interviews, groups and surveys; focus and dinner party groups, accompanied shopping and ethnographies, online and in-store advertising and label testing, expert and consumer liquid testing and evaluation, and brand development and positioning testing.

Wine Intelligence owns a global survey of wine drinkers known as Vinitrac®. This survey uses a representative sample of adults who drink wine in different markets (Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, Denmark, Ecuador, Finland, France, Germany, Hong Kong, India, Italy, Ireland, Japan, Mexico, New Zealand, Paraguay, Peru, Poland, Portugal, Russia, Singapore, South Korea, Spain, Sweden, Switzerland, The Netherlands, UK and US) and consists of a standard question set to which the companies / associations can add their bespoke questions.

It provides different types of reports during the year, such as landscapes reports, portraits reports, special interests reports and sparkling wine reports.

1.2. Duties during the internship

My internship was performed at Wine Intelligence Spain from mid-February to mid-June. I worked with Juan Park, my professional supervisor and Director of Spain and South America, in the office of Valladolid, which was opened in 2017. I was in constant contact with the head office in London, working with different areas of Wine Intelligence.

I was at the office from Monday to Friday, 9 hours per day except on Fridays that I was 8 hours. I had the opportunity to participate in different projects of the company, such as:

- Japan and Spain Landscape Reports and Charting
- Research for Vinexpo New York 2019: I helped with the secondary research about gender behaviour and attitudes for a presentation during this event
- Viña San Pedro y Tarapacá: this is one of the biggest projects in the company. We started searching for the logos requested in order to build the surveys. Once they were ready, we had to test all of them to see if they matched with the base pack questionnaires, that they had all what the client wanted to ask, that they made sense for the respondents, etc. After testing all the surveys in all the languages they were launched to 15 markets. Once we had the data, we prepared the reports to deliver to the company

- Torres Brand Health and Consumer Behaviour: my first job when I arrived was Torres charting, formatting and making the report for four markets to present to the company. Here, we used the data obtained with Vinitrac® in Japan, Finland, Germany and Canada to measure brand health for specific brands that they requested
- Translations: because we were only two Spanish speakers I did almost all the translations for advertising, reports, surveys, etc.
- Navarra Brand Health Reports and Charting: this project was made to measure Navarra brand health and to understand which styles and attributes Spanish consumers associate with this region and its competitors
- Concha y Toro Peru and Colombia Landscapes and Charting: this project had the aim to understand channel usage and reasons for purchase and non-purchase by channel, how acceptability of price differs by channel and the differences between how wine-producing countries of origin are perceived in Colombia and Peru
- Concha y Toro Colombia trade interview with Colombian people related to wine in order to have a better understanding of Colombian wine market
- California Sustainable Winegrowing Alliance logo search and survey
- Ecuador base pack questions, survey and translations
- Added new contacts to HubSpot
- Rioja DOCa reports. The Rioja Consejo made visits and events for specific people to inform them about the DO and to understand how the brand is seen in other markets, in this case it was in USA, Canada, China, Mexico and Switzerland. After the trip / event, they made a survey asking if visitors learned about Rioja, if they knew it before, recommendations, etc. I also did the charting and reports of the surveys made in ProWein, where they made a workshop to promote the region

Moreover, I read books that my professional supervisor recommended and were a motivation to write this Master Thesis, I assisted to events such as "Aula de la Prensa del Rioja" in Logroño and "Marketing & Wine Summit" in Valladolid and I had the opportunity to visit some wineries in Rioja.

1.3. Master Thesis Basis

Wine tourism has always existed but in the last years it has experienced a boom around the world, not only as touristic activities in wineries, but also as part of gastronomy, rural and even luxury tourism. Although wine consumption is decreasing in most of the countries, especially those with higher rates of consumption, people want to experience wine in new ways.

During my internship I had the opportunity to know more about scientific marketing thanks to my Professional Supervisor and it was a motive to link my internship with wine tourism. The first thing I learned is that every person that wants to study scientific marketing will hear about Andrew Ehrenberg, who was one of the first ones that dedicated his work to marketing research, consumer behaviour and advertising. He created the Centre for Research Marketing in London and he started the Research and Development Initiative, which became associated with the Marketing Science Centre in Australia. Nowadays, it forms The Ehrenberg-Bass Institute for Marketing Science and it is directed by Byron Sharp, who continues with his research method. Sharp is the author of the book “How Brands Grow: What Marketers Don’t Know”, which, together with other books based on Ehrenberg´s studies, have been used to develop this Master Thesis.

I think that scientific marketing, data gathering and analysis will allow wineries, regions, brands, etc. to understand the scenario for wine tourism and be more efficient developing marketing strategies and proposals. It has been applied to many different categories of products, such as beverages, banks, cars, technology, etc., but there are not many studies applying it to tourism and wine tourism, so it is an opportunity for the sector to grow based on real data.

My objectives with this work are:

- Have an overview on wine tourism situation in Spain and Castile and León
- Choose two Denominations of Origin, Ribera del Duero and Rueda, and analyse their situation regarding oenotourism in Spain and compare them
- Understand both DO as brands and apply scientific marketing rules
- Describe suggestions that can be developed in the future for each DO

1.4. Proposals to be developed

Along this Master Thesis, several themes will be developed in order to understand wine tourism situation in Ribera del Duero and Rueda and set a framework for future research and application of marketing techniques.

Some of Byron Sharp and Ehrenberg´s ideas will be explained, such as consumer behaviour, brand growth, advertising, loyalty and different laws that can be applied to wine tourism. Also, a brief information about Spain, Castile and León and Ribera del Duero and Rueda will be described to set in the situation of the DO studied.

To finalize, some advices will be given in order to improve within wine tourism market and grow.

2. METHODOLOGICAL APPROACH

2.1. Theoretical background

Wine tourism is a growing market, it has history but it has become more popular over the last years, consequently there are not many analysis about it. It is possible to analyse it from the side of a winery, a region or a country, so it is necessary to clearly set the framework. For this Master Thesis I will analyse it from the side of the Denominations of Origin, considering them as brands within the market.

The aim of this work is to have a better understanding about how wine tourism market works and how data and consumer behaviour analysis can be used for a DO to grow. Wine tourism is a market that includes two very different products, wine and tourism, thus we can see that some law-like patterns are applied to it and its brands. Byron Sharp, Professor of Marketing science in the University of South Australia and Director of the Ehrenberg-Bass Institute for Marketing Science, applies scientific methodology across categories and brands, and simplifies marketing principles down to a few laws and seven rules for brands to experience growth. He listed them in his book “How Brands Grow: What Marketers Don´t Know”. The ones that are more important for the present work are:

- **Double jeopardy law**: brands with less market share have fewer buyers and they are less loyal
- **Retention jeopardy law**: all brands lose buyers proportionally to their market share
- **Natural monopoly law**: brands with more market share attract more occasional buyers
- **Duplication of purchase law**: a brand shares more customers with large brands and fewer with small brands

Nowadays, there are many advices and theories about marketing but they are not often supported with proper data. I propose to base the marketing decisions on scientific marketing, in order to understand and predict how markets work. It helps to differentiate what we can predict to maximize success, from what we can´t forecast to minimize risks. To do so, it is important to comprehend not only how the markets work but also how a brand can grow and how consumers behave in relation to it.

We understand a DO is a brand, but what does it mean to be a brand? What is a brand? Philip Kotler defines a brand as a name, term, sign symbol or a combination of these that identifies the maker or the seller of a product (Kotler & Armstrong, 2018). It is perceived as a code created in our minds to facilitate recognition in stressed situations, for example, when we want to buy something and there are thousands of options but we don't have information about all of them. It makes a product easy to distinguish from others. It is extremely important because when a buyer is going to purchase, he or she will buy or choose what he or she is familiar with in order to avoid experiential blindness. The period of time in which the consumers go through this phenomenon is characterized by a large activity in the brain. Ramsoy (Dr. Ramsoy, 2015) supports that there are three effects that affect consumers' choices:

- Choices are based on unconscious processes and influences
- Emotions affect choices, people do not decide after deep thinking about every option
- Decisions are made after complete information is obtained

He uses a model in his book to set the framework in order to understand consumer behaviour, where there are steps characterised by four stages: **representation**, which is the way in which needs and desires are presented to the consumer, can be associated to motivation; **predicted value**, that represents the prediction made by the consumer of how much he or she will enjoy the brand, it is what drives to choose a particular brand and can predict actual purchase; **experienced value**, the enjoyment (or not) when consuming the brand; and **remembered value & learning**, which is associated with memory and brand liking, very important for future purchases.

So all the process of choosing and buying a brand happens unconsciously in the brain, which works with predictions that help people to understand quickly and efficiently the world around them. It predicts based on similar experiences that people already have been through in order to find sense to what it is in front of. It has been proved and showed in scanners that when consumers see a product that they don't recognize, their brains works harder, wasting energy to find a match. Buyers have a very busy life and they don't spend a lot of time thinking about brands and they don't remember them easily. They interpret reality based on their previous experience, expectations and motivations, what they perceive from the outside is less important when choosing a product. So brands not only compete within the real market but also in the mental marketing, creating concepts and memories in the consumers' brains. Understanding this is vital to make decisions on how to build and advertise a brand in order to grow.

Continuing with consumer behaviour, people buy the brands they know of or the ones they trust based on their motivations and opportunities, purchases depend on factors related to the circumstances and the situation. They settle for something that they consider to be good enough for them, not a perfect product. For example, beer is highly consumed because people find more occasions and motivations to drink it. But consumers have different tastes that changes with time, they want variety. Emotions, this predictions or guesses, as Lisa Feldman Barrett defines them (Feldman Barrett,

2017) made by buyers´ brains, are the primary source of people´s motivation, influencing their memory, attention and behaviour. We can mention here brand loyalty, which is something that many brands are betting on but it is a natural behaviour driven by habits and convenience when making a purchase. People use it as a buying strategy to balance risk and avoid wasting time. The lack of consideration and evaluation of other alternative brands make consumers to have a personal repertoire of brands, so the loyalty is also divided and driven by opportunity and the situation they are in. When buyers don't have a brand in their repertoires for a certain product, they generally choose bigger brands because they have heard of them or they seem familiar. Familiarity raises brand knowledge and liking (Sharp, 2010).
On the side of the brand, growth is very important if not the main objective of every brand but it is very difficult to accomplish in market share due to the competition and it is different according the size of the brand. It is important here to differentiate two types of consumers, defined by Byron Sharp in his book as:

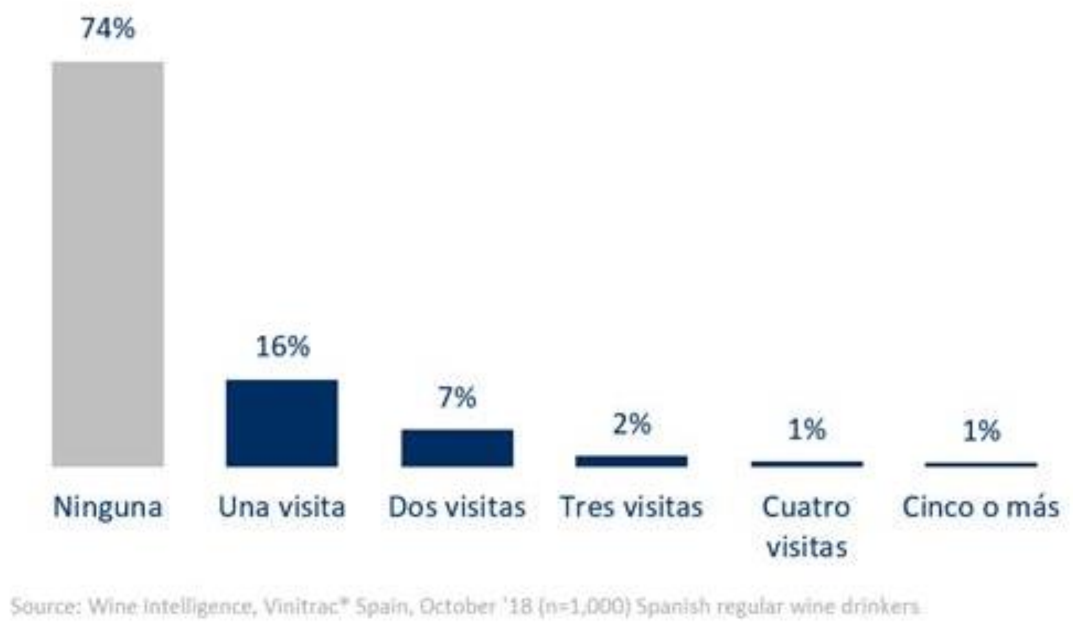
- **Lighter buyers**: they are occasional buyers of a brand
- **Heavy buyers**: they buy the brand more than once a year. They are more receptive to the brand than lighter buyers

Brands in general, have many light buyers who buy it very occasionally because they buy a larger number of brands, and a shorter number of heavy buyers who buy it more often, it is to say many buyers that are not loyal and a few loyal consumers. This was posit by Ehrenberg, who said that consumers follow a Negative Binomial Distribution, which is an extension of Poisson distribution that consists in a mixture of this with different means. This model makes the following assumptions:

- The items or events being counted have no effective upper limit
- They occur independently of each other
- They occur irregularly
- The probability of occurrence can vary from case to case

Consequently, each consumer individually follows a Poisson distribution, which is usually used to describe data that come as counts, but the different consumers have different rates of purchase, meaning that they have different means. The NBD takes the reverse-J-shape, showing that when brands grow or decline in market share, they move from one weight of this distribution to another (Ehrenberg, 1982). At Wine Intelligence the distribution of visitors to wineries has been adjusted to a NBD, as it is shown in Figure 1. We can see in this graph that among Spanish regular wine drinkers, who are the main visitors in both DO analysed later in this work, most of them don't make any visit and as the repetition increases, the number of people making those visits decreases. So there are a lot of people who have not visited a winery in the past year (very light buyers), less people who have visited only one, a lower proportion who has visited twice a winery and for more repeated visits, we can see even less consumers (very heavy buyers). This is very important to know what type of consumer the brand needs to focus on and what strategies it will use in order to increase its customer base.

Figure 1 Number of visits to wineries in the past 12 months



Moreover, comparing the distribution for different products within the same category, we can see that when penetration (number of buyers) increases, there is growth in direct relation of the frequency of consumption, but frequency changes very little. We can see the presence of another of the mentioned laws, the "Duplication of purchase law" which stands that brands share customers in proportion to their penetration, meaning that brands share more customers with bigger brands than with smaller ones. In tourist market, brand duplication is referred as how many people who travelled to a place or a brand, have also travelled to another one. So we can say that the popularity of the destination is a determining factor of competition between brands. This was applied and studied for tourism (Mansfield, Romaniuk, & Sharp, 2003) and the authors confirmed that within tourism industry, brands decline proportionally to market penetration and that bigger brands compete more with each other than with smaller brands. All the consumers tend to buy the leader category, the biggest brand, but the ones that purchase the leader brand, don't tend to buy other brands. Also, it was found that there are partitions, which happen when a certain group of brands present different levels of purchase duplication to their expected values, it is to say that these particular brands compete with each other with more intensity or with less intensity (Dawes, Romaniuk, & Mansfield, 2009). This can happen due to components of culture that can influence a destination choice or geographic proximity, with destinations that can be close to the visitor´s home country or destinations that are close to each other. This is important and an opportunity for neighbouring regions.

Another fact that we can observe after analysing data is that occasional buyers favour bigger brands, i.e. brands with more market share attract lighter buyers. So in order to be successful and grow in market share and sales, a brand needs to earn heavy buyers but especially it has to grow a lot in lighter buyers.

Regarding wine tourism, it is also important to understand why tourists visit certain wine regions, and to do so it is necessary to know the key attributes of the experience than drive the tourist to make a visit. The concept of "tourist terroir" came up (Hall, Longo, Mitchell, & Johnson, 2002) and it was defined as a "unique combination of the physical, cultural and natural environment that gives each region its distinctive tourist appeal", it is to say that it includes landscape (vineyards and their complements), wineries and the winemaking activities such as harvest, press, bottling, etc., being a multidimensional product.

When choosing a wine destination, consumers base their choice on destination perceptions, motivations, values and beliefs regarding the place to visit. Motivations are very important, they are part of consumer behaviour because consumers have needs that have to be satisfied, as tourists and as wine / food consumers. It is crucial to know and understand consumers' motivations in order to satisfy their needs. Karin Alant and Johan Bruwer described (Alant & Bruwer, 2004) three dimensions within the motivational framework:

1. <u>Visitor</u>: including demographics, wine-related lifestyle and wine consumption and the sub-dimensions linked to motivations such as consumer behaviour, wine brand knowledge and affinity, learning / discovering and socializing
2. <u>Wine region</u>: containing its geographic location, regional brand image, cellar door profiles, wine products, landscape and attractions with its sub-dimensions being accessibility, proximity, infrastructure, climate, economic development and tourism life cycle stage
3. <u>Visit dynamic</u>: this dimension refers to the visit, if it is a first-time or repeat visit and its linked sub-dimensions are the purpose of the trip, travel mode, decision making, previous exposure, duration of the stay

According to the theory of wine behaviour (Ajzen, 1991), there are three key constructs which drive consumer behaviour:

- Attitude: the overall evaluation of the behaviour. Beliefs and values are included here
- Subjective norm: the influence of others about the engagement in the behaviour, what people think the tourist should or should not do
- Control: the perceived ability to engage in the behaviour

So, in order to intent to visit a wine destination, tourists value the experience´s attributes and they believe that these values will be satisfied by engaging in the behaviour if they hold positive attitudes towards it. They also expect acceptance of the behaviour by their families and friends and they need to believe that they have the resources to make it. It is also important the attitude of consumers to past behaviour and the involvement with wine activities for this particular case. The involvement with wine and knowledge of the wine region, wineries, etc. affects people´s motivations. Wine tourists are wine consumers looking for product-related experiences and a different lifestyle.

So, knowing motivational framework and consumers' profile is an advantage for the brand (DO) in order to understand visitors' purposes and motivations to go to a wine region and provide an experiences that satisfies tourists' needs.

Wine Routes of Spain (RVE, 2019) has built a profile of wine tourists in Spain where it is shown that:

- 55.3% of wine tourists are women
- Almost half of them are amateur regarding to wine. The other half is formed by beginners and wine lovers
- 38% of them are between 46 and 65 years old
- 43% of visitors are couples and 35,6% travel in groups with an average of 3,6 people
- 59% of them spend the night in the wine region, with an average stay of 2.43 days, mostly in hotels but also in rural accommodation and they visit almost 2 wineries as an average
- More than half of the organization of the trip is made through internet
- 83% of the wine tourists travel by car, whether it is owned or rented
- There is a lower proportion of visitors that prefer cultural activities, being wine related activities the most preferred by them, such as visit to wineries, wine tasting and purchase, visit wine dedicated villages and enjoying local gastronomy
- The main motivations to perform the trip are oenotourism and leisure and vacations

- Almost half of the visitors know about the wine region due to a recommendation made by friends or family, and 27,5% are aware by knowing the wines produced there
- They feel a high satisfaction after visiting wineries but they complain about signage

Wine tourists can also be segmented, according to their preferences, motivations and involvement with wine, which can make easier to understand them and give them what they want or need. A segmentation made in Greece based on motivation and wine interest of the visitors divided wine tourists in four segments or clusters (Alebaki & Iakovidou, 2010):

- **The Wine Lovers**: the major motivation for members of this cluster to travel to a wine region is to visit a winery seeking to meet the winemaker and learn about wine and winemaking. According to this research, these people is educated, with high income, interested in wine and they consume enough of this beverage. Based on other research (Charters & Ali-Knight, 2001) we can add that wine lovers are very likely to have attended to wine courses and tastings before the trip. They added a sub-segment to wine lovers, wine **Connoiseurs**, being more likely to be men keen to have extra educational opportunities presented to them.
- **The Neophytes**: these visitors visit wine regions driven by the desire to learn more about wine, seeing the winery as a major attraction. Members of this cluster are mainly students, with high educational level but low income. In other classifications (Charters & Ali-Knight, 2001), they are known as **Wine Novice** or curious tourists.
- **The Occasional Visitors**: mainly motivated by gastronomy, this segment of wine tourists don´t really seek to learn about wine. They have a good income and their educational level is not high.
- **The Hangers-on**: these visitors visit the winery as part of a group who has decided to visit it, but they are not interested in wine. They are mainly employees with low educational level and middle income.

2.2. Wine tourism in Spain

In order to understand the situation of the proposed DO, first it is necessary to be situated in the context of the country and the autonomous community.

Spain, with 505.944 km^2, is divided into 17 autonomous communities and 2 autonomous cities (Ceuta and Melilla), being Madrid the capital of the country.

The population in Spain is 46733038 people (INE, 2019) in total, with 38 million adults according to Wine Intelligence (Vinitrac® Spain 2017) and among them, 18.9 million are regular wine drinkers, meaning that they drink wine at least once a month with a consumption of 17,3 litters per year, which has been decreasing.

According to OEMV the Spanish territory is covered with 960758 hectares of vines (in 2018), positioned in the first place of areas under vines among all countries in the world and representing a 13% of total surface with vineyards (OIV, 2019). According to OIV, 94% of the Spanish grape production is destined to wine making, producing 40.9 million hl in 2018 (Preliminary data). Spain is also the main wine exporter in volume, with 23.2 million hl exported in 2017, and the third in value, earning 2.8 billion € in the same year (OIV). According to FEV (FEV, 2019), there are around 4000 cellars in Spain.

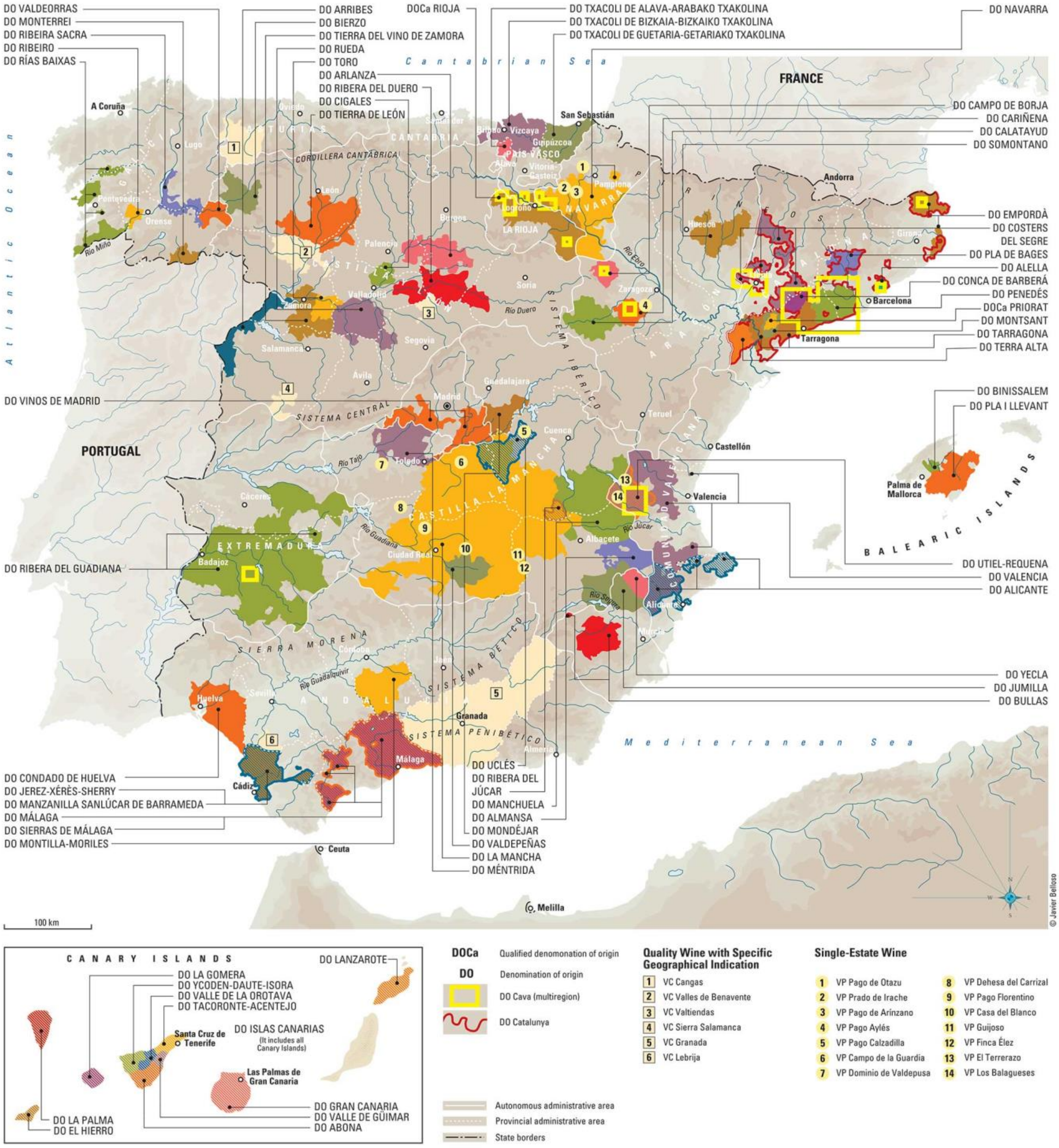
The territory is divided into 69 Denominations of Origin (DO), including two Qualified Denominations of Origin (DOCa, Rioja and Priorat), 7 Quality Wines with Specific Geographical Indication (VC), 42 Protected Geographical Indications (IGP) and 14 Vinos de Pago. The most well-known Spanish DO are Rioja, Ribera del Duero, Valdepeñas, Rueda and Navarra (see Figure 2).

In terms of wine tourism, ACEVIN created the touristic product “Rutas del Vino de España” (Wine Routes from Spain) with the support of Ministries of Industry, Commerce and Tourism and Agriculture, Fishing and Feeding. These routes are situated in wine territories in the country aiming to generate experiences for the travellers or visitors within a new touristic concept based in wine culture.

There are 595 cellars, 373 Accommodations, 306 Restaurants, 64 Museums dedicated to wine among others, associated to RVE, according to ACEVIN (ACEVIN, 2018). These sectors together suppose a thematic and specialized offer around the wine world.

In 2018, RVE received 2961379 visitors, decreasing almost 8% when compared to the previous year due to the exit of one of the most visited regions, Empordà Wine Route and Txacolí, which are no longer a members of RVE. From these visitors, 2143662 visited cellars and 817717 visited museums associated with RVE. Not only wine tourism is growing, but also the international tourists were 82 million in 2017 and the Spanish travellers increased as well.

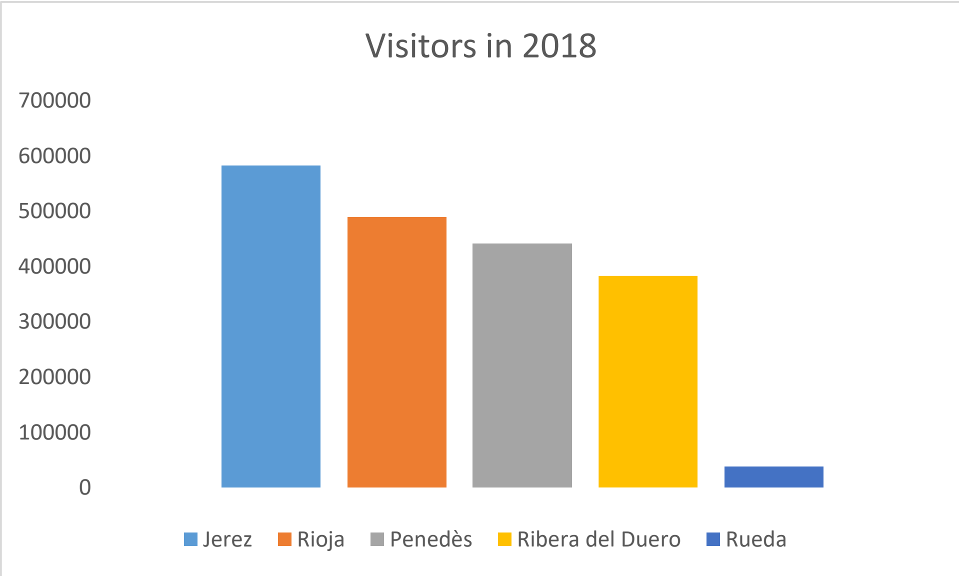
Figure 2 Spanish Denominations of Origin



Source: Vivanco (https://vivancoculturadevino.es/blog/2015/04/23/denominaciones-origen-vino-espana/)

The most visited regions in 2018 were Jerez, Penedès, Rioja (divided in Rioja Alta and Rioja Alavesa) and Ribera del Duero, as we can see in Figure 3, but the ones with the strongest growth in the period 2016-2018 were Arlanza (135,37%), Montilla-Moriles (42,12%), Yecla (27,56%), Rueda (17,41%), Jumilla (16,18%) and Rioja Alta (15,98%). The regions that decreased in visits for the same period of time were Ronda (-30,68%), Bierzo (-15,97%), Navarra (-13,04%) and Lleida (-2,92%). Jerez and Penedès not only are characterised by the quality of their wines, tradition, wineries, but also they are located close to two big Spanish cities with a lot of tourism throughout the year, Sevilla and Barcelona, so wine tourism here could be a complement of other type of travel.

Figure 3 Number of visitors in the most visited regions and Rueda in 2018



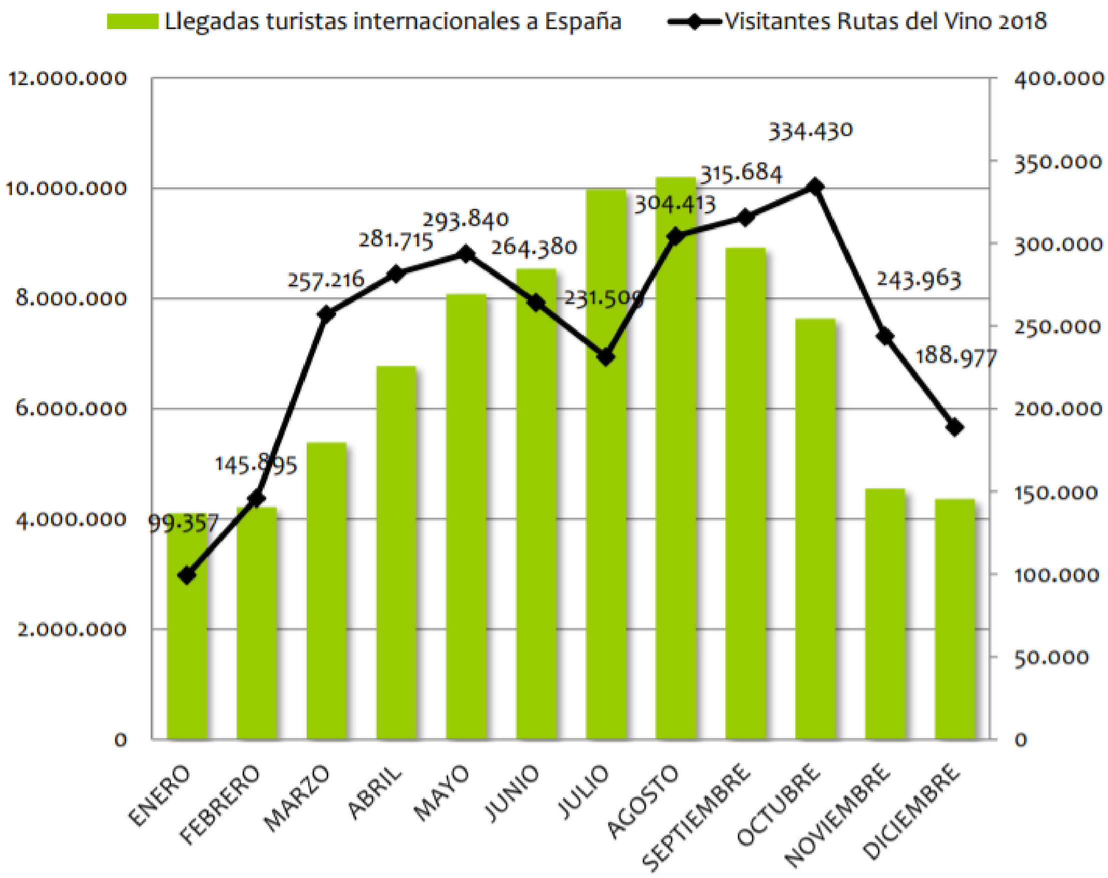
Regarding the precedence of the visitors, almost 74% are Spanish and 26% international (Figure 4), with no significant changes when compared to the year before. The most visited routes by international tourists are Jerez, Penedès and Rioja (Alta and Alavesa).

Figure 4 Distribution of visitors to Wine Routes of Spain by origin

Source: ACEVIN, 2019

As we know, wine tourism has a marked seasonality, being the spring (April and May) and summer-autumn (August, September and October) the periods that register most visits. In winter the routes receive less tourists. It also varies depending on the region or DO, for example for Jerez the month with most visitors was September, for Navarra it was August and for Rioja it was October. This distribution of wine tourists throughout the year is complemented by the distribution of international tourists arriving in Spain, fighting seasonality (Figure 5).

Figure 5 Monthly distribution of international visitors vs. visits to RVE wineries and museums



Source: Frontur (2018), National Institute of Statistics (INE), ACEVIN, 2019

The expenditures are also growing with respect to the previous years, reaching 80967646 € in 2018 between cellars and museums, which represents an increment of 20,5% comparing with 2017. According to the survey that ACEVIN presents every year to the visitors of RVE, they spend (ACEVIN, 2018):

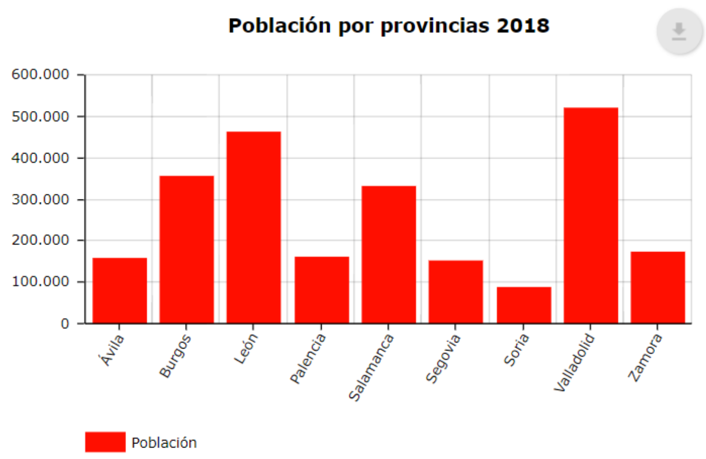
- 42 € per day in restaurants and bars
- 34 € per day in accommodation
- 31 € per day in wine purchases
- 20 € per day in visits to wineries
- The average stay is 2.54 days

As we can see, wine tourism in Spain has a growing trend, not only in visitors but also in expenditures. Although some regions are more visited by international tourist, the main market are Spanish visitors. While wine consumption is decreasing, wine tourism is positioning as a sustainable touristic product that contributes to a balance of the territory and complements other types of tourism in the country such as beach, cultural and rural tourism.

2.3. Wine tourism in Castile and León

Castile and León is the biggest autonomous community in Spain, with a surface of 94226 km^2. It is composed of nine provinces, being Valladolid, where my internship took place, the capital. This autonomous community has 2425801 inhabitants (Junta de Castilla y León, 2019), most of them in the capitals of the provinces, which suggests that wine tourism could be very positive for the rural areas to be repopulated.

Figure 6 Population by province



Source: Castile and León Statistics, Demographic Indicators 2017

Castile and León is located in the North-West of the Iberian Peninsula and it borders with Asturias, Cantabria and Basque Country in the North, with La Rioja and Aragón in the East, with Madrid, Castilla-La Mancha and Extremadura in the South and with Galicia and Portugal in the West. As we can see, it is connected with many important cities, especially for wine tourism, and also with Portugal, being part of the Duero hydrographic basin.

Figure 7 Castile and León

Source: http://lalogopedadelcole.blogspot.com/2013/04/dia-de-castilla-y-leon.html

This autonomous community has nine DO: Arlanza, Arribes, Bierzo, Cigales, Ribera del Duero, Rueda, Tierra de León, Tierra del vino de Zamora and Toro. Five of these DO converge in Valladolid. Wine has a long history here and it is in this city that the wineries of San Benito monastery, and San Pablo and Santa Cruz School were outstanding. Wine consumption was not exclusive for the monks but it was also rooted among the lay people, for whom wine represented an important contribution of calories to their diet, due to meat prices. There were other professions related to wine as well, for example, the wineskin makers who manufactured the recipients to store wine, accommodation, food and drink could be found in taverns and these traditions remains nowadays. Castile and León also is the region with most cultural heritage sites listed in UNESCO according to National Geographic and it is characterised by its high quality gastronomy, making it a perfect place to experience wine tourism.

For the present work, I chose to compare two of the five DO that exist in Valladolid, Ribera del Duero, which has a high awareness not only in Spain but around the world, and Rueda, that is important but it doesn't present the high numbers in wine and wine tourism that Ribera does. So in the following text, we can go through these DO to understand their position in Spanish oenotourism.

2.4. Ribera del Duero

The Denomination of Origin Ribera del Duero was created with the initiative of winegrowers who were concerned about fostering the vineyards and the quality of the wines from this territory. In July 1982 its regulations were approved, exceeding any other area of the Duero Valley both in vineyard hectares and number of wineries. The Regulatory Council of D.O. has as their main function to guarantee the authenticity of the wines of Ribera del Duero, assuring the consumer that each bottle that has a numbered label has passed rigorous controls before reaching its glasses. They also do promotion of the region and collaborate with private and public entities in research to improve the quality of the vineyards and wines.

The DO is located between four provinces: Valladolid with 19 municipal districts, Burgos with 59, being the province with most of the vineyards concentrated in it, Segovia with 5 and Soria with 6 municipal districts. In total, they sum up 23205 hectares (2018). Burgos represents the 73.5% of the total surface, Valladolid 20.4%, Soria 5.4% and Segovia only 0.7%. Half of the vineyards were planted between 1991 and 2010.

Figure 8 Denomination of Origin Ribera del Duero

Source: http://www.info.valladolid.es/detalle-enoturismo/-/asset_publisher/tsTHh9OHDDRR/content/enoturismo-do-ribera

In 2018, there were 296 wineries within the DO, 190 wine tourism services and 64 entities members of RVE, according ACEVIN. In the same year, Ribera del Duero received 383150 visitors, growing almost 2% in one year and remained as the third most visited region among those members of RVE. 243211 visits were registered in cellars while the rest of the visitors went to museums. 335579 tourists in this DO were Spanish, while only 47563 were from abroad.
The best time for visits in Ribera del Duero was during the month of October, while the month were less visits were registered was January.
Regarding average spend, this DO presents the highest one compared after Lleida, being 38,63€ per day, while the average price for a visit increased to 10,17€. This high difference between averages spend and price in the wineries shows that tourists not only spend money in the visit but also they buy wine and other products sold in the wineries (ACEVIN, 2018).

2.5. Rueda

Rueda is the oldest Denomination of Origin in Castile and León, it was created in 1980. Although at the beginning it only allowed the production of white wines, nowadays red and rosé wines are also produced within the DO. It is located between the provinces of Valladolid, Segovia and Ávila, including 72 municipalities where in total they sum up 7800 hectares of vineyards and more than 40 wineries, being Verdejo, a local grape variety, the one leading the production. Its privileged position in the centre of Castile and León allows tourists to encounter an environment both attractive and unknown.
White wines have a long history in Rueda and it is said that these were offered in the Catholic Monarchs court. In the land of Medina famous white wines were produced in underground wineries, excavated under the houses in many of the villages.
Regarding wine tourism, 83 entities are members of RVE and they received 38009 visitors in 2018, increasing 17,41% in relation to the previous year. From these tourists, only 11% visited museums. 90% of total visitors were Spanish, with only 10% international tourists.
The best month in terms of visitors in Rueda was May while the worst, like in most of the DO, was January.

Figure 9 Denomination of Origin Rueda

Source: http://www.info.valladolid.es/detalle-enoturismo/-/asset_publisher/tsTHh9OHDDRR/content/enoturismo-do-rueda

The average price for a visit to this region is 10,05€, increasing since 2017, and the average spend, lower when compared to Ribera del Duero, being 27,76€ for Rueda. Although low prices for visits sometimes help to increase the average spend due to wines and other products purchases, some wineries increase their prices in order to be more selected with visitors and attract wine enthusiast consumers (ACEVIN, 2018). As we can see, despite being located close to Ribera del Duero and producing quality white wines, Rueda had significantly less visitors who spend less money when compared to Ribera del Duero.

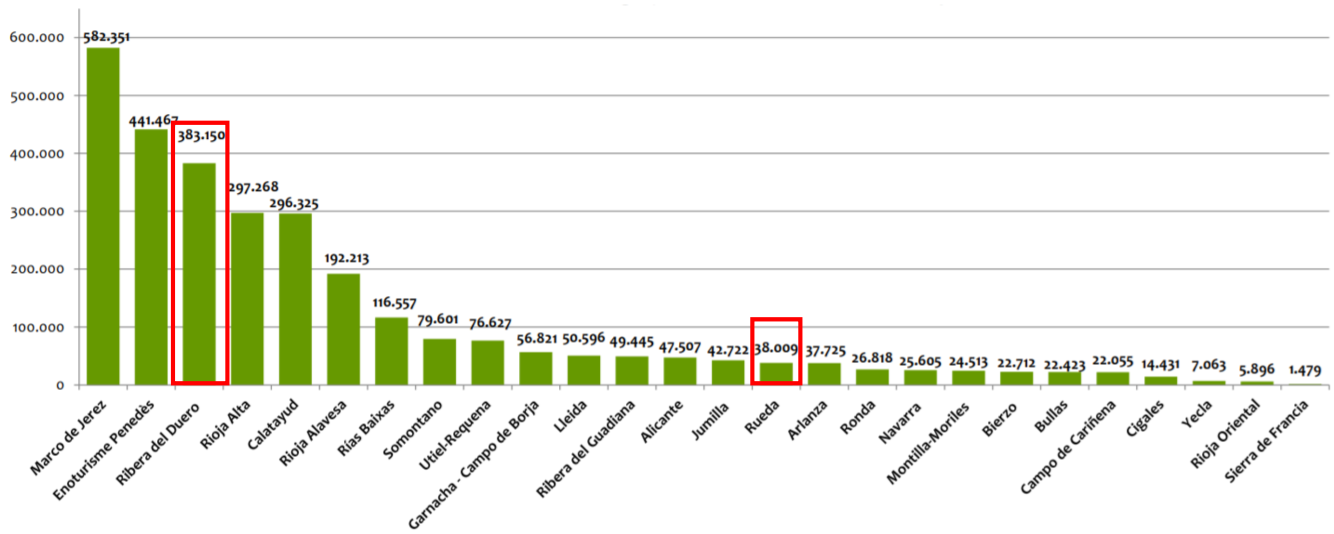
3. DISCUSSION

3.1. Data analysis

Number of visits depends on how many tourists visit the DO and how often they do it, so one possibility for the DO to get more visits is to encourage visitors to repeat them, as they can see that those tourists enjoy being in the DO and come back to it, but the proportion of people doing that is very low, so even if they repeat the visit many times, they would never reach a high number of visits. This is associated to loyalty programs, which even if they work, it has been observed that their effect is weak as they skew towards heavy visitors of the DO. These loyal visitors notice loyalty programs more easily and join them. The other possibility to increase visitation in the DO is to attract light buyers, people who have never made a visit, because they represent the highest proportion of consumers.

Theoretically a DO could grow in both ways, but in practice it is not possible. It has been proved that brands with different market share have a big difference in their customer bases or penetration but their average purchase rates doesn't vary a lot. So in order to grow in market share, it is essential to grow in penetration more than in purchase frequency or loyalty, which would be translated into having more visitors than repeated visitations in the DO. This is what the double jeopardy law establishes and it has been observed for all kind of brands (Sharp, 2010). As we can see in Figure 10, Ribera del Duero has a significantly higher customer base, that is to say number of visitors, than Rueda and people is more aware of this DO. Most of this visitors are "light buyers", people who visit the DO occasionally, but there are so many of them that they contribute largely to the customer base.

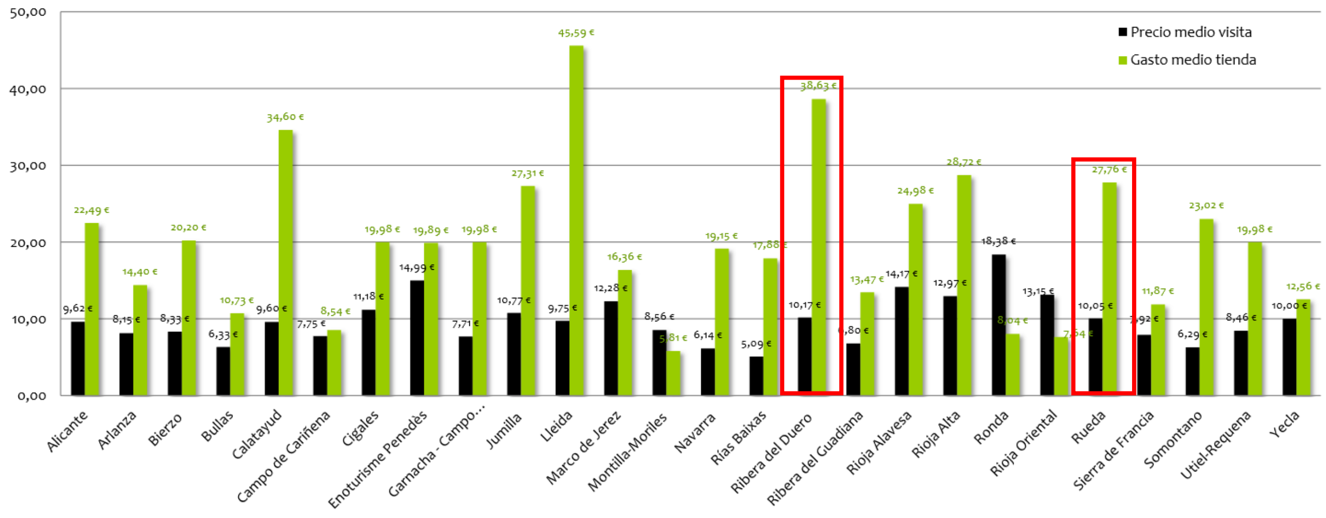
Figure 10 Number of visitors to Wine Routes of Spain wineries and museums in 2018



Source: ACEVIN, 2019

Not only Rueda has a significant lower proportion of visitors, but also they spend less money during their stay compared to Ribera del Duero (Figure 11).

Figure 1 Average price of the visit and average spend per visitor in RVE wineries in 2018



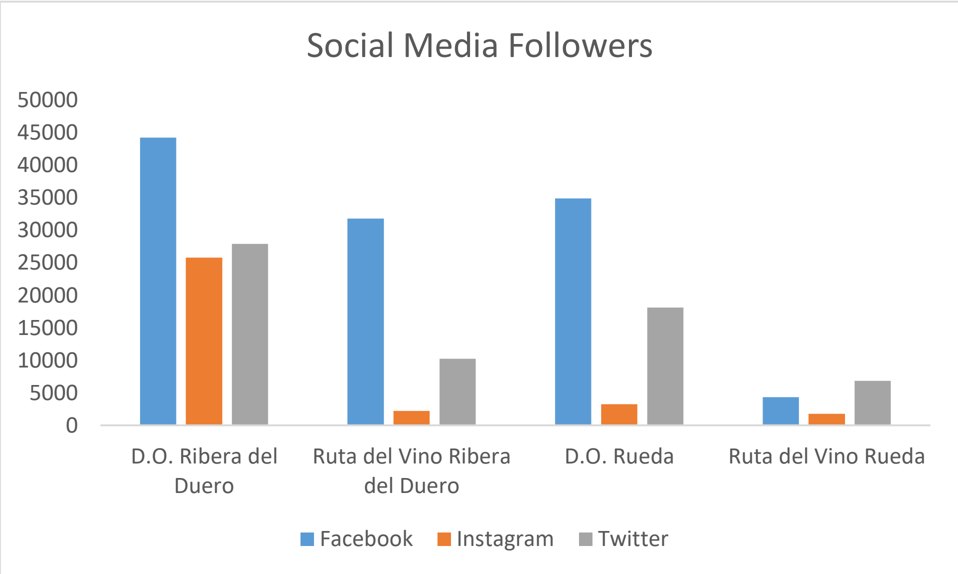
Source: ACEVIN, 2019

Despite both DO are located very closely and they make quality wines, there is a larger number of people aware of Ribera del Duero compared to Rueda. Awareness, it is to say, percentage of people who is aware of or know a DO, is 85% for Ribera del Duero wines while the purchase of its wines is 50%. On the other hand, 67% of wine drinkers are aware of Rueda and only 23% buy its wines (Vinitrac® 2019), mostly in the centre zone of Spain, where Castile and León is included (Vinitrac® 2017, 2019). Normally, a wine region is known for the wines that are produced there, so it is expected that more people will know of Ruta del Vino Ribera del Duero and this Denomination of Origin. According to Vinitrac ® 2019, two among the three first wines ranked in brand health in Spain are from Ribera del Duero, Protos and Marqués de Cáceres, which is a good opportunity to promote wine tourism with them. We can see in Figure 12 the amount of followers in the main social media for each DO and their correspondent Wine Route (Ruta del Vino). In all social media shown, DO Ribera del Duero presents the highest engagement compared to DO Rueda and both wine routes. On the other hand, Rueda Wine Route has the lowest amount of followers, presenting a low awareness among social media users. It is crucial to be known in order to attract customers and grow in market share and penetration. 85% of internet users in Spain, the main market for both DO, use social media (IAB Spain, 2019), and most of them use it to chat with their contacts, watch videos and see what their contacts are doing. So it is possible to increase awareness through social media engagement by showing the brand where people is paying attention, for example, making an interesting video.

Also, there are a lot of website referring to similar things such as Rueda and Ribera del Duero DO websites, Rueda and Ribera del Duero Wine Routes websites, another website promoting both regions together (https://www.riberaruedawine.com/), Wine

Tourism in Castile and León website (https://www.enoturismocyl.com/), among others. All these websites present a lot of information, sometimes it is the same but sometimes not. For example, Ribera del Duero Wine Route promotes a wine passport, as we will see further in this work, that includes Rueda Wine Route but it is not promoted in its website; the same happens with the Wine Train (El Tren del Vino), which is only promoted in Wine Tourism of Castile and León. Information is not organised and it is not easy and practical for potential wine tourists of these wine routes.

Figure 2 Ribera del Duero and Rueda Social Media Followers



3.2. Proposals

In order to grow within wine tourism market, it is important that the DOs increase their awareness among consumers and also their mental availability, understood this as the probability that a consumer recognize and think about the DO when choosing which wine region to visit. So, in order to maximise growth, focusing in more frequent consumers is efficient but thinking in long term could be more effective to convert non-consumers into consumers and increase light buyers or visitors in the brand, because it is not possible to develop based only on existing customers. In the case of Rueda, due to its lower awareness compared to Ribera del Duero, it is central to have some loyal buyers in the short term and to acquire new visitors as a long term objective. Generally, acquisition of new clients is cheaper than customer retention in a certain period of time, but for a small brand loyal customers or heavy buyers are very important. As we know, penetration and loyalty always move together, but penetration is much more responsive to marketing, so it should be the main focus.

In order to persuade tourists to repeat the visit it is often delivered a wine passport and after reaching a number of visits, the visitor receives a benefit. This strategy is used in the USA, where we can find many examples such as “Washington Wine Passport” that consists in a membership for one year which provides exclusive offers in many wineries of the region (www.washingtonwinepass.com, 2019); “Coastal Wine Trail Passport” in Napa Valley can be used during 2 to 3 nights, depending on which prize the visitor chooses; “Cascade Foothills Winegrowers Passport” in Oregon offers wine tastings, special discounts and the possibility to win a prize.

The first DO that implemented this in Spain was Penedès, with its “Carretera del Vi”. Here they have a digital / physical passport where they register the visits to each member winery and they offer exclusive discounts and premium tastings. Valladolid also offers a wine passport where Ribera del Duero and Rueda are included. After four visits to wineries in Ribera del Duero, Rueda or Cigales, the passport owner has to send it and he or she will receive tickets to visit touristic centres in the province, food products and the possibility to win a wine tourism experience in Valladolid. This could be a benefit for Rueda. Ribera del Duero is more known among wine consumers and being promoted together in the same passport is convenient for Rueda, but it is not possible to find information about it in Rueda Wine Route website, which needs an update. This is a good opportunity to increase both, loyalty and penetration by encouraging repeat visitation and giving the chance to people who is not consumer to become one. It should be more promoted in Valladolid and also in cities closely located. Madrid is not far and it could be a good option for people from the city to escape to a more relaxed experience. Since 2018, there is a train created by RENFE, Valladolid and Wine Routes from Rueda, Ribera del Duero and Cigales that takes people from Madrid or Segovia to experience one of these wine routes for a day, being affordable for most wine tourists. This should be seen as soon as a person enters in the Wine Route website, but it is not easy to find in the analysed web pages. So it is recommended that potential visitors see about this train and the passport easily when searching for information about their future Wine Route to visit.

Rueda Wine Route should create a partition due to its proximity with Ribera del Duero and Rioja, and it should promote itself as an option for people visiting others DO nearby, but showing its personality with the brand, because it is only close to others DO, but it is not the same; Rueda has its own identity especially regarding to Verdejo. It is important that, during promotion, the brand does not refresh consumers’ mental links with other brands and shows its own products.

Another proposal would be to promote the Wine Routes with the wines. Most of the visitors know about a wine region through its wines. Add small promotion in the label, deliver brochures when someone buys the wine, etc. Protos and Marqués de Cáceres are the better ranked wines in Spain, the first one has wineries in both DO, Rueda and

Ribera del Duero, and the second one in Rioja and Rueda, so showing the Wines Routes in these wines could reach a lot of people who is not aware about wine tourism in these DOs. Protos, in the Wine Tourism page of its websites, has links to the Wine Routes and to a website promoting both DO together. This should be in more wineries with wine tourism offers, so if people is seeking for wine or information about the winery, they will see that they have the option to have oenotouristic experiences within the DO. Also, the DO and Wine Route should be promoted together, not as separate things. In Valladolid there are billboards promoting Rueda DO but they do not mention the Wine Route (see Annex A3). Another option to promote the wine routes is a group named "Jóvenes por el Vino" (young people for wine) that offers tastings, classes, visits to wineries, among other activities. People can be associated to this group and they have special price in the events, but everybody is invited and it would be very interesting that the DOs work together with them because they attract mainly young people and future consumers, and they have a relaxed and interesting philosophy to share.

Therefore, it is important to create mental availability by investing on effective advertisement and brand distinctiveness. It is crucial that the brand stands out so that buyers can identify it easily; it has to be noticed, recognised and recalled by consumers (Sharp, 2010). Distinctiveness decreases the need to think, making consumer´s life easier and favours loyalty, because once it is in the buyers' mind they will consider it when purchasing. After the link between the product and the brand is created in visitor´s brain it is necessary to refresh it through advertising, which will affect consumer behaviour. So, following Sharp´s ideas, an advertisement has to be processed to build memory structures that have to be associated with the brand in order to increase sales and growth. Here, the DO should consider:

- As mentioned before, emotions drive motivation, influencing memory, attention and behaviour. Advertising that includes explicit emotional appeals has stronger effects on consumer´s reaction and they should lead to acceptance. Consumers are in presence of hundreds of advertisements during the day, so it is important that the ad makes them pay attention to it
- Reach is more important than frequency when the advertisement is exposed. Influence people through social media is essential nowadays, but also TV and online videos, being the use of images and music very effective. Images are more important than text because the brain processes what it is seen more than what it is read. In social media, it is important to interact with people, know the audience, and communicate the brand's vision. A long term strategy should be defined first

- Binet & Carter suggest to play with seasonality, focusing advertising during buying seasons. Wine tourism seasonality is strong and it is aimed to decrease its effect, but advertising when people is more receptive to the experience is an opportunity to be in the next visitor´s mind. Also, when people is not about to purchase, they are not thinking about the brand, so it is important to use things they are interested in, such as music, celebrities, etc., to get their attention (Binet & Carter, 2018)
- Use brand image research to understand what consumers have in their minds and work with it. If visitors are less aware of the brand, what is the case of Rueda Wine Route, the DO should emphasise on building memory structures

So, taking these points into account, an affective advertisement must:

- ✓ Reach all the category buyers, it is to say all wine tourists. "Target situations and states of mind, not segments" (Binet & Carter, 2018)
- ✓ Get noticed by consumers
- ✓ Use clear brand links. It is crucial here to show what products are offered, the brand name, what it does, what it looks like, when and where it is consumed, etc.
- ✓ Refresh and build memory structures. Be aware of refreshing memory links with competitor brands
- ✓ Create intention to consume the product

Something crucial to apply scientific marketing is data collection. Ribera del Duero and Rueda work with data provided by ACEVIN, who collects it from wineries in all the Denominations of Origin associated to Spain Wine Routes. This information is important, but if brands want to grow they should be in charge of their own data collection, according to their objectives in short and long term.

Before make any marketing decision, each DO should gather and analyse data and test their brand health within the market to understand how they are perceived by consumers, if they are aware of them and with what are these brands linked in visitors' minds, what image do consumers have in their brains associated to each brand. Also it is important to know what tourists' motivations to visit each DO are. Once they have a picture of their situation in wine tourism market, they can decide which direction to follow according to their aims. They should remember to pay attention, besides sales, to market share when analysing data.

To summarise recommendations both DO should have into account in order to grow within wine tourism market (Binet & Carter, 2018):

- Think in long term and effectiveness

- Think about penetration more than loyalty, it should be the main focus
- Do not target segments but moments and states of mind. Segmenting wine tourists helps to understand them and to offer to each group what is best suited for them but they should not be the only focus of the brand. Be creative to attract people who is not interested in wine tourism
- Focus on light buyers and convince them to be visitors or to visit more frequently the DO. Do not think only in wine lovers or wine tourists, because people who was not planning a visit to a wine region can change his / her mind after a good ad or the recommendation of a friend, for example
- Use behavioural measurements such as frequency and weight of visits, average spend, repurchase rates and cross-selling rates to review the brand situation and relate it to loyalty
- People do not think about brands most of the time and they have more important things to do during the day so be easy to find, to understand and to be purchased, make customers' life easier and save their time. To do so, it is necessary to build mental and physical availability. To build the first one, the DO has to develop memory links being distinctive and possessing a clear branding. In order to build physical availability, the product has to be distributed in space and time (in tour operators, websites, etc.). Following these marketing tasks, the DO will be able to build brand salience, defined by Byron Sharp as "the propensity of the brand to be noticed or to come to mind in buying situations" (Sharp, 2010). Regarding to this, the DOs, Wine Tourism of Castile and León and Wine Routes should present concrete and consistent information in their websites; instead of having so many websites, they could have only one for wine tourism and DO for example, especially taking into account that more than half of the organization of a wine trip is made through internet.
- Advertising´s reach is more important than frequency. Remind people about the brand and refresh memory links
- Evaluate marketing decisions´ results, for example, after an ad, an event (ask consumers about their suggestions for future events, what they enjoyed, what they did not), etc. Liking is a good analyst of sales effectiveness, especially if its measurement is complemented with techniques such as facial expressions tests.
- Do not forget about simplicity, sometimes it works better that way
- Purchases are driven by emotions and motivations. Create opportunities for people to please their motivations and needs

- Friends and family recommendations and acceptance are very important for visitors. Deliver a good experience and foment word of mouth communication

4. CONCLUSIONS

To conclude, these research has shown that practical and general laws about brands can be applied to wine tourism in order to help the Denominations of Origin to grow within the market, with a rational use of monetary resources, investing in the things that are proved to work better to accomplish brands' objectives, minimising risk and holding growth in the long term. Also, the information that brands have as a base is very important, they need to know who they are selling to, what consumers want and how they choose among their options in order to give them what they need and they are motivated to buy and how they want it to increase the probability to sell.

There are not many research works about applying these laws in wine tourism and Denominations of Origin, but I think it is very helpful because decision making based on real and well interpreted data minimizes risk and allows to know where to invest.

It is an idea for future research and data collection that is worth to try due to an increase in wine tourism offer and a big competition within this market, with many countries, Denominations of Origin and wineries offering the same thing. So, I hope future research will promise success and a reasonable use of resources, without forgetting that, even if it is a business where brands want to increase sales and have more customers and profit, they are working with nature that is the one that makes all these experiences possible, so always prioritize it over economic interest and work in balance with it.

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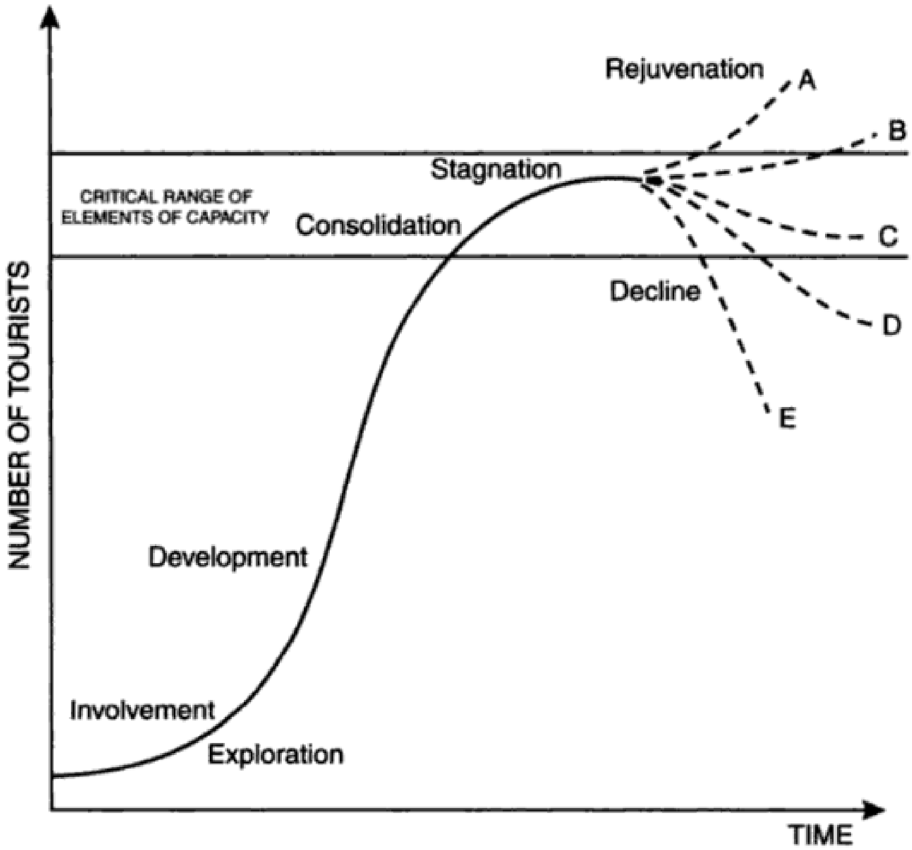
ANNEXES

A1. Tourism Life Cycle

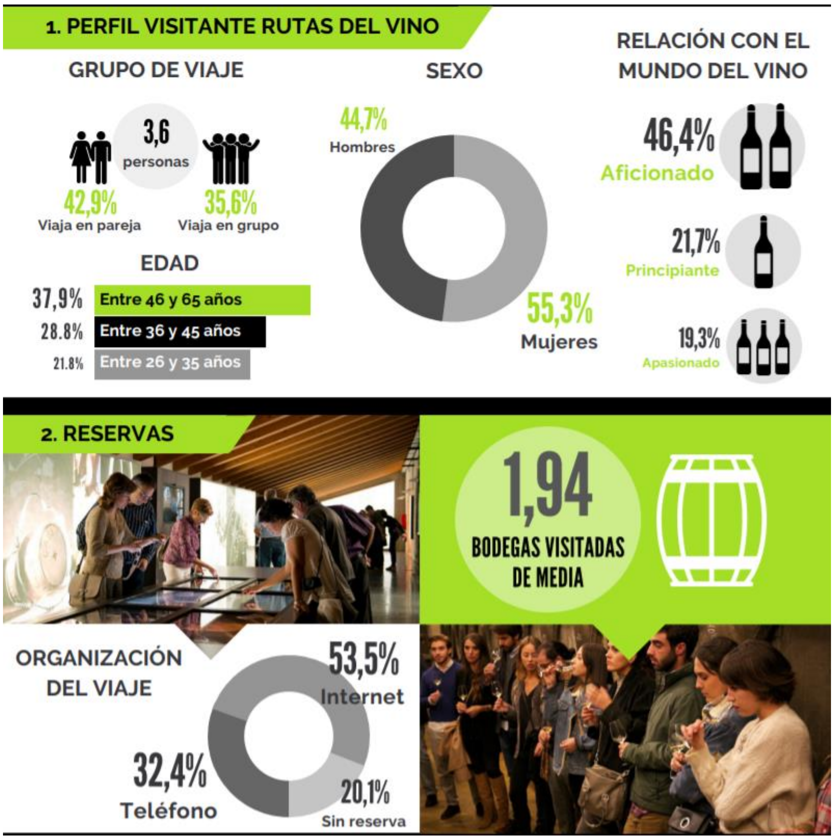
Annex 1: Tourism Life Cycle



Source: THE TOURISM AREA LIFE CYCLE VOL. 1. Applications and Modifications. Richard Butler

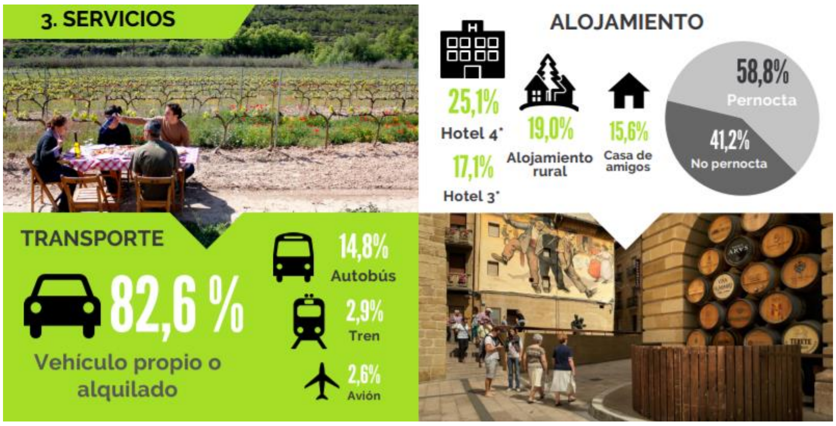
A2. Wine tourists' profile in Spain

Annex 2: Wine Tourists Profile



Source: https://www.wineroutesofspain.com/bd/archivos/archivo915.pdf

Annex 2: Wine Tourists Profile



Source: https://www.wineroutesofspain.com/bd/archivos/archivo915.pdf

Annex 2: Wine Tourists Profile

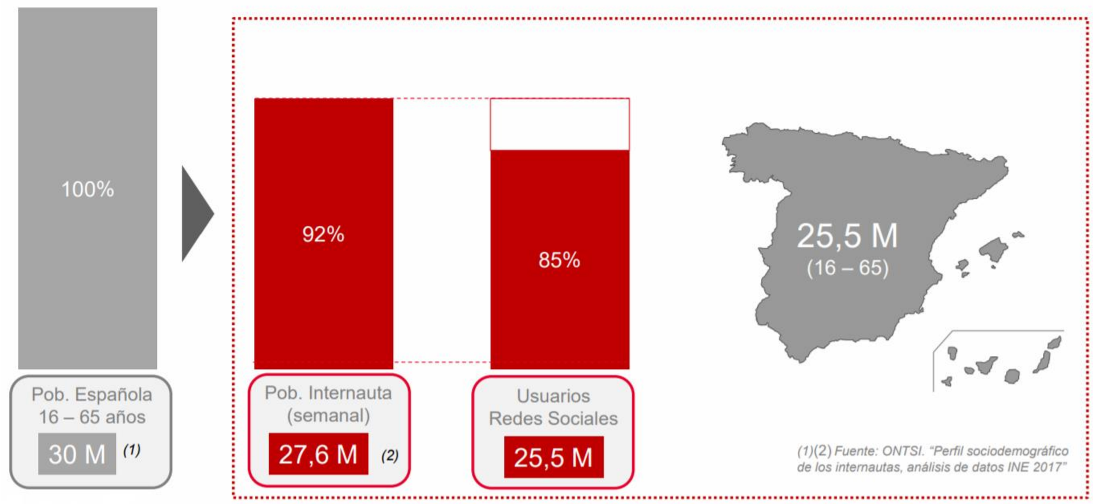
Source: https://www.wineroutesofspain.com/bd/archivos/archivo915.pdf

A3. DO Rueda promotion in Valladolid

Annex 3: DO Rueda promotion in Valladolid

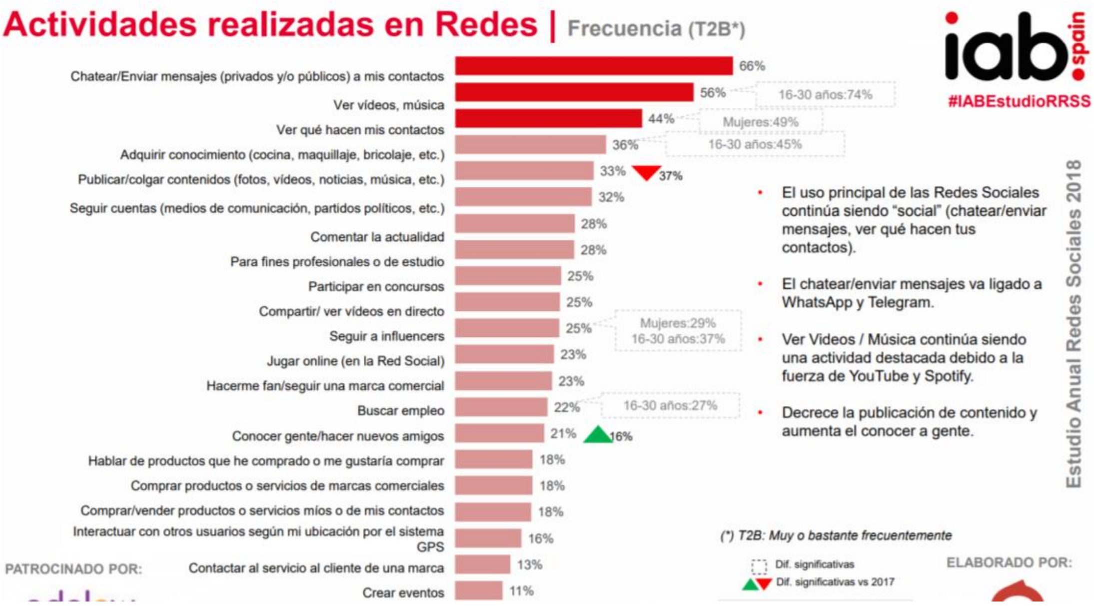
A4. Social Media in Spain in 2018

Annex 4: Social Media Users in Spain in 2018



Source: IAB Spain, [*https://iabspain.es/wp-content/uploads/estudio-redes-sociales-2018_vreducida.pdf*](https://iabspain.es/wp-content/uploads/estudio-redes-sociales-2018_vreducida.pdf)

Annex 4: Activities in Social Media in Spain in 2018



Source: IAB Spain, [*https://iabspain.es/wp-content/uploads/estudio-redes-sociales-2018_vreducida.pdf*](https://iabspain.es/wp-content/uploads/estudio-redes-sociales-2018_vreducida.pdf)

A5. Wine Tourism in Protos' website

Annex 5: Wine Tourism in Protos' website

and one crianza red wine. Please note that our tours are available upon demand for individuals or groups and visits require a minimum of 8 people.

Price per person		Adults		Children from 4 to 17 years		Group with more than 20 persons	
		11 €		5 €		Ask	
Showing hours	Tuesday to Friday	10:00	11:00		13:00	16:30	18:00
	Weekend	10:00	11:00	12:00	13:00	16:30	17:30 18:30

Optional visits are available for a minimum of 8 persons that include the tasting of several wines:

Protos Origen Visit

It includes a tasting of Protos Verdejo, Protos Crianza y Protos Reserva. Price: 16 €/person.

Wine Tasting Training Sessions

The basic 4-hour wine tasting sessions are focused on people who want to become aware of the wine world and learn the basics of wine tasting. Price: 40 €/person.

Corporate Events Organization

A new feature is the possibility to use the facilities of the winery for the organization of different events: meetings, conferences, lectures, wine tastings... Check prices and options.

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TripAdvisor Ranking

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Most Recent Traveller Reviews

27 May 2019: "Big modern winery in Ribera"

28 Mar 2019: "Left a bad taste in our mouths"

12 Sep 2018: "Comprehensive tour"

7 Aug 2018: "Tour that teaches a lot about wine"

8 Jul 2018: "Very nice and we'll organized visit and..."

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Ruta del vino Ribera del Duero

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Source: Bodegas Protos, https://www.bodegasprotos.com/en/wine-tourism/visits/